

# **Montana VR Council Meeting Minutes October 4-5, 2006**

# Vocational Rehabilitation Council

## October 4-5, 2006

### Disability Determination Room Helena, MT

**Members present:** Denise Corrao, Faith Dawson, Dalayna Faught, Maureen Kenneally, Carol Lambert, Sharla LaFountain, Ruth Straley, Dick Trerise, Claudette Vance, Michelle Williamson

**Members absent:** David Boyd (excused), Dan Burke (excused), Jackie Colombe, Kermit Horn, Don Jones, Ron Mills (excused), Dennis Moore (excused), Wayne Nankivel (excused), Paul Pearson (excused), Arlene Templer (excused)

**Staff and guests present:** Peggy Williams, Barbara Varnum, Beverly Berg, Bob Jahner, Joe Mathews, Brigitte Winfield, Sue Anderson, Scott Williamson, Trish Kinley, Beki Brandborg

#### Wednesday, October 4, 2006

Beki Brandborg facilitated the meeting, and we looked at our accomplishments over the past year and recommendations for the future for the Governor's Report, and we developed goals for our three committees. The notes from this day are included as Attachment A

#### Thursday, October 5, 2006

##### Announcements, Updates, and Minute Approval

David Boyd will represent the Council at the Montana Association of Rehabilitation conference at the end of October.

We need to review our mission and values statements to see if we need to amend or add to them based on what we did on Wednesday.

The minutes from July were approved.

##### Public Comment

There was no public comment.

##### The Big Picture

Joe Mathews stated that the VR state plan was approved for this year (effective October 1). He also mentioned that the VR agreement with higher education was signed—the issue here was who would pay for ancillary services (interpreters, etc) for college students. VR believes that according to the Americans with Disabilities Act, the colleges should pay. Currently we are splitting the cost 50/50.

VR fully matched the federal grant, and even applied for and received extra federal funds—about \$194,000. VR is on track for getting the budget done for the next biennium—the Governor will release his budget numbers after the election, but they still need to be approved by the Legislature.

Joe recently attended a conference on the future of VR in Washington DC. About 75 people attended including state directors, councils, and advocacy groups (NFB, AFB, NAD, Cerebral Palsy, Easter Seal, Vets, Brain Injury, NCIL). Joe is mailing some information on this to Council members. During the meeting, the delegates discussed priorities for VR in the future. Apparently there is not much interest in capping services, but there are many proponents of order of selection where people with the most significant disabilities would be served first. This has not been Montana's priority. Montana VR would like to continue serving everyone who comes in the door. The philosophy of the states which push order of selection is that Workforce should serve people without the most significant disabilities and VR should serve people with the most significant disabilities. However, many Workforce centers look to VR to help with any person with a disability. Also, even if Workforce centers served people with disabilities, they would not be sending them (in most cases) to post secondary education. Joe also heard that other states, like Montana, are finding that they are losing counselors to the Veterans Administration, which pays significantly more. Also there are not enough students in college being trained as counselors to meet the need of counselors who are retiring.

Funding on the federal level is not expected to drastically increase. There is a budget deficit, and Workforce is getting less money. States are hoping to get more federal money for transitions. Nationwide, VR is facing increasing costs. Technology costs are high, rural states like Montana have transportation issues, and physical restoration services (including gastric bypass surgery) are increasing as states cut back on their Medicaid programs.

The feds, Charles Sadler and Erica Shepard, visited Montana in August. They enjoyed their trip to Miles City where they visited the VR office and met with council members David Boyd, Carol Lambert, Ron Mills, and Denise Corrao. Charles and Erica also visited Billings and Helena. The federal government will conduct on-site reviews every three years, and Montana's review will be in 2008.

### Transition activities

Brigitte Winfield went over the types of transitions (school to work) activities that VR is participating in. She discussed both the activities on the state level (National Governors Association grant, transition training, contact between VR and all Montana high schools) and on the local level (individual visits to high schools, job club for transitioning students, information source for PLUK, counselor visits to Montana Youth Leadership Forum, etc). There is a lot going on in the area of providing services to students and young adults.

### Standards and Indicators

Peggy Williams reported on the federal standards and indicators for 2006. VR rehabilitated 909 Montanans with disabilities in 2006, compared to 899 last year. VR met all the federal standards and indicators.

### Strategic Plan Update

Peggy updated the Council on the progress for VR's strategic plan. Attachment B shows how VR has addressed each of the items in the strategic plan.

### Consumer Satisfaction Survey

Peggy presented Barbara Varnum's comparison of the consumer satisfaction survey results over the past five years. Two years (2004 and 2005) had lower data due to a clerical problem which has been corrected. One year (2001) had a low response rate due to the way the surveys were distributed—this was changed in 2002. Some of the data is not valid because of the small number of responses—for example, there were only 11 responses in 2005 for Blind and Low Vision.

Questions that received the highest positive responses were:

- If a friend were in need of similar help, would you recommend our program?
- If you were to seek help again, would you come back to our program?

#### Blind and Low Vision Proposed Rules

Beverly Berg reported on the administrative rules for the Older Blind program. This program has never had state administrative rules and it was time to do that. Because the Older Blind program budget is only \$250,000, there is not enough money to serve all the people who need the service. The rules address who will be served, and the order of selection is based on the consumer's functional abilities. Denise moved that the Council agrees with the proposed rules for the Older Blind Program, and the motion was passed.

#### Field Services Update

Bob Jahner stated that both the general VR program and Blind and Low Vision Services are both fully staffed. Over the next 2 weeks, VR will be providing bi-district training in Butte and Missoula. Two regions will attend each of these trainings. This annual training is an opportunity to provide training on day to day issues such as eligibility, Social Security, and the new case management system (nearly complete).

The budget is looking good right now, and Order of Selection is off the table for the immediate future.

Bob also talked about a due process case he is working on where a person with a mental illness does not want that information to be included.

Next Meeting Date—has not been decided. We will try to meet when the budget subcommittee hears the VR budget (probably January), but we will not know the date until December.

#### Next Meeting Agenda Ideas

Chuck Leggate—PR set up

Barbara Varnum—Extended Employment questions

Any changes to the Mission and Vision statements?

Sensitivity training for disability issues

Information on PLUK

Information on CAP

**ATTACHMENT A**  
**Planning Meeting Notes from Bekki**  
**October 2006**

**Vocational Rehabilitation Council**  
**Planning Meeting**  
**October 4, 2006**

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## **I. Report to the Governor**

Dick, Faith, Denise and Claudette volunteered to be on a committee to help with the annual report, and build on what was brainstormed today.

### **A. What did each of our Committees accomplish that we want to include in the Report? What are we really proud of?**

#### Public Awareness Committee:

- Our education of and relationship with legislators; both have been strengthened. Their awareness of our issues has been raised.
- We increased the awareness by community members of disability issues, via:
  - newspaper articles;
  - two television segments on specific topics;
  - brochures placed in strategic spots;
  - a video on disabilities was distributed and one was given the Governor's office;
  - Friends of Rehab mailings;
  - Vocational Rehabilitation and SILC are part of the daily conversation; and
  - Repeated, continual advocacy.
- Different perspective of viewing disabilities due to our membership.
- Education about disability is not a journey, but a destination.
- We spoke to the Governor regarding Vocational Rehabilitation.

#### Transitions Committee:

- We supported the funding of the Montana Youth Leadership Forum (MYLF) at the Legislature.
- We impacted the new IEP forms, including new laws and regulations.
- We participated and provided input to the Governor's Task Force report to the Governor.
- We established a link from VR counselors to high schools.
- We presented at the statewide Transitions Conferences, PLUK (Parents Let's Unite for Kids), and Deaf Conference.
- Our Committee suggests that the Ft. Belknap Tribal VR be profiled in the Governor's Report.

#### Native American Committee:

- We were successful in holding a VR Advisory Council meeting at the Ft. Belknap Reservation. Our intention is to hold one meeting each year on a Montana Reservation. We also completed a cultural sensitivity training for the VR Advisory Council while we were there.
- Do a profile of one of the 121 Tribal projects.
- A VR Council member attended CANAR in Green Bay, Wisconsin in March, 2006.
- We met all of our goals.

## **B. What has the Council – as a whole – accomplished in addition to what our Committees have done?**

#### The perspective of the Public Awareness Committee:

- The Governor hosted a reception at his home for people with disabilities.
- The Governor attended the Workers' Compensation Conference.
- Native Americans are now included in the employment records; they are integrated. SWIB.

#### The perspective of the Transitions Committee:

- We provided a forum for cultural education by meeting at Fort Belknap and including a cultural training on our agenda. All the 121s attended.
- We supported 121 effort at the Northern Cheyenne Reservation.
- Denise's video!

- Awareness of transportation issues.

The perspective of the Transitions Committee:

- We provided a forum for cultural education through our meeting at Fort Belknap, including both cultural training and recognition, and all the participation of all the 121s.
- We supported the 121 at the Northern Cheyenne Reservation.
- Denise's video!
- Awareness of transportation issue.

The perspective of the Native American Committee:

- We supported funding of MYLF at the Legislature.
- We impacted the new IEP forms, including new laws and regulations.
- We participated and provided input to the Governor's Task Force report to the Governor.
- We established a link from VR counselors to high schools.
- We presented at the statewide Transitions Conferences, PLUK (Parents Let's Unite for Kids), and Deaf Conference.
- Our Committee suggests that the Ft. Belknap Tribal VR be profiled in the Governor's Report.

**C. What has the disability community as a whole accomplished, beyond the VR Council's work?**

The perspective of the Public Awareness Committee:

- The Disability Action Alliance advocates for our common issues.
- There was strong attendance at the SILC Symposium.
- Public awareness grew via news articles, talk about mental illness, and better reporting of the increasing numbers of people with disabilities.
- We met standards and indicators.
- NAMI's work coordinating with public entities for better services in communities.
- Public awareness of head injury issues.

The perspective of the Transitions Committee:

- Governor's Task Force and Executive level awareness.
- Continued evidence of disability community assimilation into the larger community.
- MAB – technical specialist position added for the state.
- Greater awareness of transportation issues.
- Increase in fairs, conferences, and other opportunities for learning for a broad spectrum of transition issues.
- The Medicaid Infrastructure Grant was obtained.

The perspective of the Native American Committee:

- The Governor recognized the Disability Committee and invited them to his home for punch and cookies.
- The SILC Symposium set a record with over 150 attendees.

**D. What do we want the Governor to know and understand about VR services?**

Group 1's brainstorm:

- VR work and efforts contribute to the state's economy. Refer to the statistics.
- The needs of consumers are evolving. VR is dedicated to evolving to meet those needs.
- VR has reached out to develop and extend services to the Native American communities through the 121 programs.



#### Group 2's brainstorm:

- VR services are vital to training people for employment. Refer to the:
  - Hows;
  - Costs;
  - Successes; and
  - Benefits.
- The need continues to grow.
- Services are individualized with a wide range of services. It's not a one-size-fits-all approach.
- The function of VR is become more efficient and effective.

#### Group 3's brainstorm:

- How important they are by making people tax payers, which makes money for the state.
- Stats at a glance – the number served, dollars earned, average wage, etc.
- The needs of older people who are blind will increase as the population and people age.
- Personal stories: Pick a person who got a job AND is off Social Security.
- The importance of VR services getting people off Social Security, independent, and that it makes it possible for people to work.
- Business Enterprise Program and opportunities opened up for people who are blind and low vision.
- How much money we get from Social Security.

### **E. What do we want the Governor to consider based on our advise and expertise, get behind and support in the future to make VR services even better than they already are?**

#### Group 1's brainstorm:

- Keep the VR budget on his priority list.
- Change the system so people try to get to work BEFORE they go on Social Security.
- Increase the number of VR staff to serve the increasing numbers of people with disabilities.

#### Group 2's brainstorm:

- Supported employment and extended employment.
- A waiting list status means reduction of services.
- There are huge numbers of people with disabilities wanting to enter the workforce, but who need Extended Services to do so.
- More money equals more folks working equals staff needs.

#### Group 3's brainstorm:

- Funding and the federal match.
- Need for VR full time employee increases, to improve the VR Counselor / consumer ratio.
- Support of VR benefits for individuals and the state as a whole: socially, economically, and the community.
- We realize the critical component of success of our vision is consumer input. We want to expand that input.
- Increase funding to better educate consumers within their communities regarding available services.
- Establish some funding to increase awareness among employers regarding the benefits of hiring people with disabilities. Create incentives for hiring people with disabilities, and have people meet with personnel/HR people about these incentives. Identify the barriers to hiring, and the best way to reach them, and find out what they could and could not accommodate. Focus on those that do work; bring them in, to highlight what is working and successful for both employers and employees.
- Create a list of people and contact information of people who have a disability and are working (social workers, nurses, trades) to be resource people for potential contact by people not yet working for job shadowing, and to help people figure out what they might want to be and do. Create work trial experiences where VR pays for

accommodation equipment to reduce the risk to the employer. Then if the employer decides to hire the person, the employer can purchase the equipment.

**F. What do we want the Governor to consider based on our advise and expertise, get behind and support in the future for ALL people with disabilities?**

Group 1's brainstorm:

- Talk to Anna in the Governor's Office.
- The importance of Medicaid Buy-In for people who go back to work.
- The importance of developing transportation networks for people with disabilities and Montanans.

Group 2's brainstorm:

- All people with disabilities have value.
- Being disabled is a normal part of life; therefore it is also a normal part of the workforce.
- The umbrella term “disabled” segregates and discriminates. We encourage inclusion versus exclusion.
- Promote and get behind a job shadowing day. These will provide experiences for people to see examples of progress.
- Support the employment of people with disabilities to the employers.

Group 3's brainstorm:

- Support an annual SILC Symposium for people disabilities to build awareness.
- Continue working with and including Tribes. There are many people with disabilities on Reservations. There is a greater number of people with disabilities among Tribal members versus non-Tribal members.
- Encourage personal involvement by the Governor with people with disabilities.
- Hire more people with disabilities for state jobs.

## **II. Committee Action Plans for 2007**

### **A. Public Awareness:** What activities do we want to commit to for 2007 as a Committee?

- Structure: Legislature, business, consumer, general public (PR).
- Legislators:
  - Develop talking points. Denise, Peggy, Peg and Maureen. Start in October, 2006.
  - Attend hearings.
  - Make at least one personal contact with a legislator. Ongoing.
  - Remind legislators regularly about disability issues. Send Stats at a Glance, the Governor's Report, and postcards on a monthly basis.
  - Write a letter to the editor for all newspapers about how critical funding is, the matching rate, and successful employer/employee stories.
  - Review how to testify at the legislature. Be sure to offer a suggestion and solution, not just present a problem.
- Business:
  - Establish liaisons with a few businesses.
  - VR join and network with Chambers of Commerce and service groups like Rotary.
  - Put together a portfolio of success stories of VR consumers and happy employers.
  - Recognize businesses by giving an award (either VR or VRC). Name an employer of the year, and create publicity around the award and its winner. There could be more than one award. Ask the Governor to present the award.
  - Educate businesses about ADA.
- Consumers:
  - The purpose of this education/awareness building is to let them know what services exist.
  - We already distributed brochures at doctors' offices and other key places.
  - Make presentations at schools. Denise.
  - Provide more information on CAP, especially highlighting the fact that CAP is an advocate, and not just for filing lawsuits.
  - Provide more information about the availability of PLUK as a resource. Perhaps create a directory of services.
  - Encourage the publishers of the phone directories to include a listing in their community pages a list of VR-related services. Dalayna will call DEX and find out what we need to do. She will ask for a column titled "Services for People with Disabilities."
- General public:
  - This is the hardest group to influence because they are not directly affected. Focus our energies on other groups. Use this areas to reach families that need the services, but don't know about them.
- Talking points:
  - Make business cards for Council members.
  - Folder.
  - Talking points on both sides.
  - Different for legislators, business people, etc.
- Keep doing:
  - The Governor's Report;
  - Mailings to interested people; and
  - Use and encourage inclusive and non-discriminatory language in everything we do.

### **B. Transitions Committee:** What activities do we want to commit to for 2007 as a Committee?

- Our Chair will be Brigitte.
- Increased awareness in the VR program and how it relates to consumer needs, with a global perspective.

– Networking – business, education, consumers, 121s, and agencies.

Review of our 2006 goals:

1. Opportunity to review the Task Force's work.
2. Keep up to date on the higher education work that Ellen is doing regarding transfer of credits.
3. Seek an interagency agreement between VR, the Office of Public Instruction, and the Department of Public Health and Human Services to cooperate and best serve folks with disabilities. Ask Joe to help us be aware and see if we can help.
4. Do a summary of performance / IDEA. Identify what it is and what we want it to be . Study the Summary of Performance.
5. Ask a staff person discuss with us what is transition – other than school to work. Tell us more about adult training services.

Plans for 2007, referring to each of last year's goals.

1. Scratch this one.
2. Add to keep up-to-date on the standardization of eligibility requirements of disability services support . Request update from Ellen Swaney (PW).
3. Interagency agreement. Check with Higher Education.
4. This is not completed as an agenda. We should do a summary presentation of the transitions process to the Council members.
5. Continue to support MYLF and continue to encourage one Counselor from each region to attend. Also, blind and low vision as needed.
6. Reconnect and strengthen the existing connections with PLUK. Target connecting with youth and parents at an earlier age. Provide a PLUK overview at the Fall Council meeting.
7. Create an array of methods through professional development of VR Counselors to help them more effectively relate VR services to the IEP process. Link this with a joint meeting of PLUK, OPI, VR, Higher Education, and WROCC (Mary Morrison).
8. Develop a way of building and maintaining a disability mentor lists. First establish a feasible model! MVR Futures requests for projects.
9. MCIS link on web page. Talk to Marvalee C. Provide training on access to OPI, PLUK, WROCC, etc.

C. Native American Committee: What activities do we want to commit to for 2007 as a Committee?

These are preliminary, first draft plans to be added to at a conference call with all the Committee members and 121s to ask for additional goals.

- Designate one Council meeting to be held on a Montana Reservation. The Blackfeet Reservation has already volunteered.
- Continue to seek a Crow Tribe representative for the 121 Committee, through Barb's efforts of face-to-face contact with the Governor's Tribal Liaison.
- Actively pursue excellent attendance by all the 121s at the Council meeting we hold on a Reservation.
- Encourage participation by Native Americans at the 2007 MYLF (Montana Youth Leadership Forum).
- Make sure that all VR Counselors that serve the Reservations participate in some type of cultural sensitivity training – specific to the Reservation and Tribe they serve, not a generic one. Examples of how to receive this include attending a Native American conference, the Native American Brain Injury Conference, or CANAR. Insure that supervisors are also aware of and participating in trainings.

### **III. Council activities – our focus for the future**

1. Regarding the 2007 Legislature:

- a. Focus on establishing relationships with legislators and educating them;
- b. Create a strong presence at the Session;
- c. Make legislators aware of the 100+ statewide waiting list, and the need for more funding. Depending on where a person is, the waiting list is between 3-4 months and 7 years. It's a slot-driven program.
- d. In the next month or so, help us focus on them by giving us 4-5 talking points, perhaps on "pocket buddies" like were provided in advance of the last legislative session.

2. Education of various people important to us:

- a. Repeat the Report to the Governor, and make it as effective as possible.
- b. Educate schools beyond the prototype that Denise has developed; do more than a one-time thing.
- c. Educate consumers about the value and resource CAP provides. It needs to be explained more fully to consumers so they truly understand what CAP offers, to encourage its use by consumers.
- d. Better educate and provide better information to individuals with disabilities on Tickets to Work and other services and options.

3. Regarding our work with American Indians:

- a. Keep our Native American Committee and its work;
- b. Keep our connection with the 121s; and
- c. Encourage the Crow Agency to develop a 121 program.

4. Create a Committee to focus specifically on services for people who are blind or have low vision.

5. Regarding VR staff:

- a. Participate, like we did this past year, in the VR office's strategic planning;
- b. Encourage the recruitment of high quality staff; and
- c. Encourage VR counselors (and consumers) to use explain and encourage people to use the incentive and tax credit programs by making these more visible in the community.
- d. Make it a standard practice for Counselors to refer people on Social Security to benefits planners.

7. Regarding Transitions:

- a. Establish a liaison service *between* business owners/managers to improve opportunities for employment of people with disabilities.
- b. Encourage job shadowing and create a database of people with disabilities who are employed or have a profession so they can be a resource for folks considering those jobs and careers.
- c. Strengthen the Transitions Committee to make it less of a foreign language. Educate ourselves so we can be more involved in what needs to be done. Build on the past successes of the Committee.

- d. To empower consumers about career choices, add a link on the VR website to the Occupational Outlook Handbook to invite people to learn more about specific jobs. (Brigitte added: "We have it at people's desks." Bob: It's public domain. Council: Make it more convenient and accessible.
  - e. Encourage more parent involvement in the transitions process. Help them receive the message about its value.
8. Maintain and expand inter-agency relationships – all the state agencies and groups trying to help people. Law enforcement is an example.
9. Regarding the VR Council:
- a. Be as much help to the VR staff as possible. Ensure we ARE operating as a sounding board as possible. Use us please as a representative body; bring us question.
10. Regarding MYLF (Montana Youth Leadership Forum):
- a. Continue our support; and
  - b. Continue representation of VR counselors from each of the VR regions.
11. Regarding PLUK:
- a. A lot of the success of young people with disabilities depends on the abilities of the parents. Support learning about PLUK and accessing their resources to encourage everyone working together.
  - b. Figure out how to continue our involvement with PLUK on our Council until Dennis can return.;
  - c. Continue our trainings through PLUK for parents, including presentations and the video.
12. Get people information about VR before they go on SSI. Give people a choice about their future.
- Regarding issues:
- a. Support Medicaid buy-in.
  - b. Continue to look for transportation solutions.

#### **IV. Our Council meetings**

##### **A. What are we satisfied with? What is very good about them?**

- They are a great exchange of ideas.
- Everyone respects one another.
- I like it when we have a goal, and name the tangible steps to be working on. It makes it feel like we are truly making progress.
- When we go out-of-state and meet our counterparts, they are always amazed at the Council's excellent working relationship with the staff. Kudos to Peggy and VR.
- Sitting in a circle conveys the attitude that no one is in control of us, and everyone gets their say.
- The VR updates, and happenings from other agencies.
- I like the interaction between everyone.
- Perspectives and views on VR services outside VR.
- The quality of the people. It's fun to see everyone.
- Everyone has something to contribute.
- The sound system (when it works).
- The number of breaks is good.
- The start time at 9:00 AM, versus 8:30 AM.
- Having our lunch brought in.
- No one feels left out; everyone is invited to participate.
- Faith's patience with the sound system and us.
- Our planning process doesn't feel rushed.

##### **B. What changes about our Council meetings do we recommend for the future?**

- The ending time of our days needs to be accurate because of drivers' arrival times and our commitments to them.

- Make sure we have plenty of microphone batteries and the sound system is checked out before the meeting starts, to make sure it is working well.
- Have our Committee meetings on the first afternoon, and then invite them to meet again for 15 minutes *before* we make our Committee presentations to the whole Council. Take advantage of the renewed energy on the morning of the second day.
- We currently meet 6 days a year, and devote one of them to strategic planning, which may be too much. We could have an extra day devoted to planning the coming year. One approach would be to have a questionnaire go out in advance to do some of the hands-on work in advance of the planning session.

## V. Meeting evaluation summary

1. What was the *most* productive or helpful or interesting parts of the today's meeting?

- The fact that I could come up with ideas and not have to worry about writing it all out. Facilitator does all that for me. I just answer the questions.
- Large group brainstorming.
- Looking at what we as a Council have accomplished.
- Re-visiting goals and priorities.
- The brainstorming and reporting out of individual groups and subcommittees.
- Beki.
- I couldn't say any one thing was more productive than any other.
- Flow of information was great. Setting goals.
- All of the brainstorming – lots of great ideas! Beki's facilitation helped us keep moving forward and on a good time schedule.
- Brainstorming what we want to do as a Council in the future.
- Developing action steps is always beneficial.

2. What were the *least* productive or helpful or interesting parts of the meeting?

- N/A.
- There were none.
- All pretty good.
- Committee meetings too long.
- Complaining from others. I would have liked to have the opportunity to change groups. Reliable microphones.
- Breaking up into committees over and over.
- Missing Council members.

3. Did you *accomplish* what you wanted to accomplish? If so, what subjects or issues or topics were they?

- Yes. Planned out the agenda for the next year. List too long to repeat.
- Yes, got new ideas for the Native American Committee.
- Yes. I feel I need to change groups.
- Yes, but .... I would have liked to re-visit the vision statements as preview to set the stage for Council and committee activities and goals.
- This was my first planning session.
- Yes.
- Yes.
- Yes, putting together a plan that will serve as road map for 2007.
- Yes, the committee I am on was able to make a productive outline, and establish some goals.
- Yes, determining what we've accomplished and moving on to new goals.
- Yes! Was able to share about possibly creating a mentor list and supporting PLUK to help parents.



4. What *changes and improvements* would suggest for our future meetings?

- Test out mics for sound system to make sure it's working. 9:00 AM versus 8:30.
- Is there anything that can be done about the microphones?
- Sound system hurt my ears several times.
- Half day.
- Have a starting time at 9:00.
- Sound system.
- None.

5. What would you like to have left *exactly as it was today*? Keep these characteristics:

- Beki. Wingate Motel.
- Everything else stay the same.
- The large group discussion.
- Beki does a great job!
- Facilitator. Building.
- Today's pace was very good. Not too much or too fast.
- The facilitator.
- Keep the same pace. Some meetings feel like they are so packed with information / material while other meetings seemed to drag one. This meeting's pace was perfect!
- Really good meeting. Pace was good. Opening exercise was good.
- Beki as facilitator. Great job! Committee meetings were collaborative. The older members invited the new members to share ideas. I appreciated the openness.

6. Any *other* feedback, comments or suggestions you would care to make?

- Summarize Council suggestions and post them on the internet. Maybe it's already done. But if not, then e-mail them to members so we can continue thinking about the goals and actions.
- It was as usual very good.
- This meeting moved at a good pace – because of facilitator.
- Great facilitator!
- Having Beki as a facilitator.

## **The Vocational Rehabilitation Advisory Council Mission Statement**

Mission statements describe what we do and provide that no other organization does and provides, what we are all about, the purpose of the organization and why it exists.

The Montana Vocational Rehabilitation Council advises and works with the Vocational Rehabilitation Program to improve policies, programs, delivery of services to consumers, and methods for reaching potential consumers and employers.

## **VR Advisory Council Vision Statements**

Vision statements are a number of statements that describe the changes we want to make in the lives of the people we serve, the differences in Montana we want to be responsible for, the ideal outcomes of our collective work and efforts. They are intended to be a reach, difficult to accomplish, and presented and worded as if they are already in place.

1. The federal criteria for funding is met each year. State matching funds are provided each biennium.
2. The hourly wage paid to VR placements is deemed to be a fair wage by the workers.
3. The order of selection is a thing of the past.
4. Consumer satisfaction with the VR program grows each year – and all VR clients are aware of and accessing the Client Assistance Program.
5. The Transition program and services are considered state-of-the art, and the best possible. Many people do what the Florida gentleman did, and call us with stories about their life-long success that they attribute to a great experience with VR services.
6. Services for VR consumers are exactly what they need to be. If clients need software, that is what they receive. As inflation affects the costs of services, the services – such as gasoline allotments – are adjusted upwards.
7. Counselors are well versed in individual disabilities, technology and career choices. They are consistently known for their great compassion for our constituents.
8. The consumer/counselor relationship is based on trust and empowerment. All choices are provided to the client, with the education necessary for the choices the consumer makes to be truly theirs.
9. The issue of losing benefits when you become employed is no longer the case.
10. Public awareness of VR issues and the availability of trained people with disabilities is well known.
11. All Montana Tribes have active and successful 121 programs, and do a good job of supporting each other across the state.
12. People with disabilities are fully integrated into our society and seeing people with significant disabilities in our community is common place. They are welcomed everywhere.
13. Employers are well aware of the opportunity to hire VR clients. Our connections to the business community are strong and there are more employment opportunities than we need. Our VR clients experience long-term work commitments.
14. Schools, doctors' offices, physical therapists, hospitals, Job Service, and other likely sites all actively help spread the word about the availability of VR services and provide people with our brochures and contact information. They even recommend our services and can speak to the success of people who have utilized them.
15. Rural Montana has the VR services they need and want.

## **Our role and responsibilities as Advisory Council members are:**

1. As individual members, be publicly supportive of the Program. We can do outreach to consumers, help them make connections to services, speak positively, help change stereotypes, and bring feedback about VR services to the staff. We are allies and supporters of the counselors, and they trust us.

2. Specific activities:

- a. Report to the Governor;
- b. Develop the State Plan, help look at long-range needs;
- c. Review the Consumer Satisfaction Survey;
- d. Advise the staff on policy regarding ways to improve services using all our backgrounds and expertise.

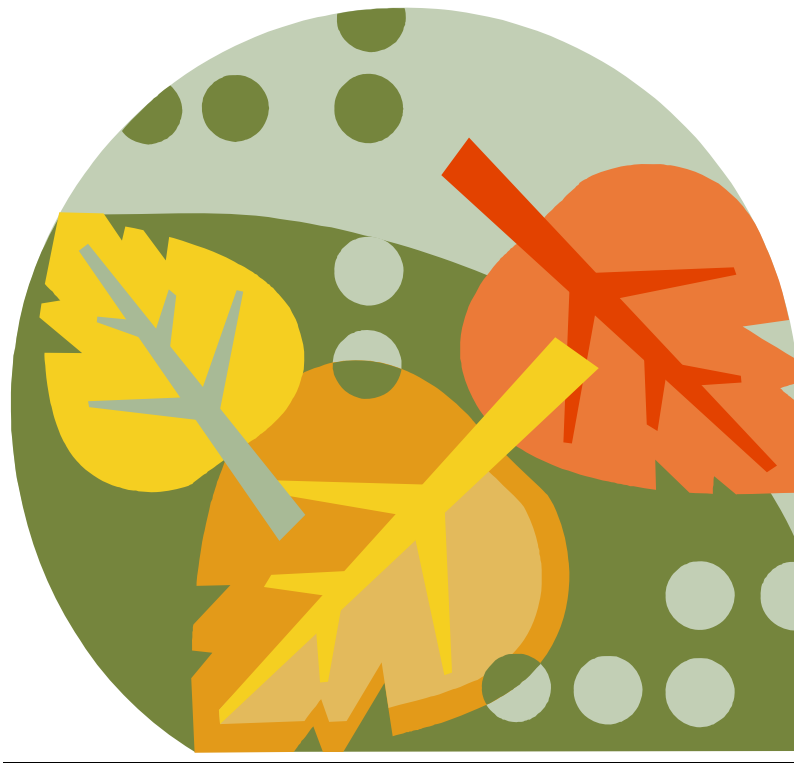
What are we NOT responsible for? What is outside of our job description?

- We don't have the authority to speak on behalf of the Council, without permission of the Council.
- We are not the managers of the Program. For instance, we don't hire and fire counselors.
- We are not the counselors.
- We are not the money managers.

**ATTACHMENT B**  
**VR Strategic Plan Update**  
**September 2006**

# *2006 MVR Strategic Plan*

Evaluated 9/2006



**Goal 1: Facilitate legislative education and awareness of our issues and work**

**Work Group:** Carol Lambert, Joe Mathews, Mike Hermanson

**Outcomes:**

1. Adequate funding.
2. Support for our mission.
3. Coordinated effort at the Legislature among everyone interested in our issues.
4. Increased credibility.
5. More opportunities for consumers.
6. More aware Legislators.
7. Better informed voters.
8. More people with disabilities engaged in the political process AND voting

Activity	Our Progress
<b><i>Repeat the Legislative Summit on August 22-24 in Missoula.</i></b> Mike Hermanson will have materials available to be available in VR offices by July 1.	<i>7-2006 Materials were made available to VR offices and the VR Council prior to July 1. Over 150 people have registered for the symposium. There is no breakdown of consumers who responded based on outreach to VR channels.</i> <i>9-2006 The symposium was very successful, and over 150 people with disabilities attended!</i>
<b><i>Promote legislation for tax incentives for business.</i></b> Mike Hermanson will research current tax incentives related to disabilities and make recommendations at SILC legislative symposium on where there seem to be gaps. Research and recommendations will be complete by July.	<i>7-2006 Research on tax incentives is not completed, but Mike is doing research on state initiatives related to increasing the hiring of persons with disabilities for state positions and may have recommendations in that area for the Symposium. Mike still plans to get research done on tax incentives before the Symposium.</i> <i>9-2007 Tax incentive research was completed without finding significant areas for recommendations. One potential area that was discussed was whether information was getting to employers. A one-page sheet was developed summarizing tax credits available to businesses and presented to regional administrators on 9-15-2006. Regional administrators suggested consulting with employers on what they might suggest for further incentives. A committee meeting will be held to discuss potential strategies for following up on this suggestion.</i>

***Commit to getting to know our legislators as a person; foster a personal contact.***

- Develop materials that will be available in VR offices to encourage VR consumers to attend the SILC Symposium on August 22<sup>nd</sup> through the 24<sup>th</sup>.
- The VR Public Relations Group will develop “Talking Points” to use with Legislators by September 2006.
- Carol Lambert will provide training and ideas on working with the Legislature at a VR Council meeting.
- The VR Council will explore ways to coordinate with Montana Association of Rehabilitation and the Statewide Independent Living Council in promoting the VR program to the Legislature.
- VR and the SILC will use Denise’s video to inform and educate legislators and the public at appropriate activities such as the symposium and Legislative Day in the rotunda.

*9-2006 Carol Lambert did present ideas on working with the Legislature at the May VR Council meeting.  
MVR is using Denise’s video, and a copy was given to our federal representatives in when they were in Montana in August.*

*Peggy is drafting some “talking points” regarding Vocational Rehabilitation for the legislature.*

## **Goal 2: Promote Public Education and Awareness**

**Work Group:** Scott Tanner, Ruth Straley, Chuck Leggate, Bob Jahner, Joe Mathews, Beverly Berg, Barbara Varnum

### **Outcomes:**

1. More appropriate referrals to the program. People understand whom VR serves.
3. More high quality jobs for consumers.
4. Easier placements.
5. Better outcomes for clients AND employers.
6. Bigger pool of educated employers.
7. More natural support for people with disabilities in workplaces and the community.
8. More taxpayers.
9. Stigma is reduced; awareness of our issues and benefits is high.
9. The workforce and community are diverse.
10. Better support by Legislators.
11. Quality of life for people with disabilities is improved.

<b>Activity</b>	<b>Our Progress</b>
<b><i>Facilitate gathering information about and establishing liaison with businesses.</i></b> MVR counselors will be asked to visit at least one business between now and (June 30 <sup>th</sup> ), 2006 and then report to other counselors about their findings. MVR regional administrators, as a part of their regional report at administrator's meetings, will indicate progress on this issue. Counselors will gather information about specific employers and find out about the type of jobs that make up these businesses, establish some level of communication with a key individual in the business and give the business information about MVR. A decision can be made after (June 30 <sup>th</sup> ) as to whether or not these types of contacts are beneficial and should be institutionalized.	<b>7-2006 Counselors are continuing to visit businesses and gather information on the types of jobs available. This information is passed on at local staff meetings.</b> <i>9-2006 Butte region counselors have recently given presentations to administration, staff, and residents of all Community Counseling Correctional Services programs. They have discussed programs and services and learned about the corporation.</i>
<b><i>Develop a set of public relations materials that can be used across the state.</i></b> Chuck Leggate will work with Central office in developing and producing a set of PR materials that can be used across the state. In FY 2007, each region will conduct one public or employee presentation using the materials developed.	<i>7-2006 MVR staff was surveyed at the All Staff gathering and at the regional level regarding the types of material which would be helpful for PR purposes. Information is being compiled by Chuck Leggate.</i>  <i>Presentations using updated power point materials include MSU College of Technology Transition Conference; statewide Transition Conference (MJTP).</i>  <i>A shopping list is being created for offices to order PR materials targeting setting up displays and having handouts for groups.</i> <i>9-2006 Chuck Leggate developed 3 different power point presentations, and other regions will use them. He also compiled a list of materials to use for regional VR booths (to be set up at career fairs and relevant conferences). This includes tablecloths, banners, doo-dads, etc. We also have developed handouts for consistency across the state. All regions will have their displays ready by December 2006.</i>



	<p><i>(Great Falls)Regional power point presentations have been developed which can be utilized in a variety of different settings. They have been used effectively for transition meetings, agency groups, and in general informational settings. During October and November, two presentations will be made at MSDB using these new resources.</i></p> <p><i>(Missoula) Counselor Brook Hodge developed a power point on transitions.</i></p>
<p><b><i>Improve materials available to counselors and staff for working with employers and businesses.</i></b> MVR will develop a brochure for employers. An example of an up to date employers brochure will be available by October 1. The task could include a simple brochure and a facts sheet similar in style to the governor's report that can be used when speaking one on one or to groups of employers. The brochure or package of information could include information on OJT, tax credits, how MVR can be of help to employers.</p>	<p><i>7-2006 Information has been received from other states (like North Dakota which has an extensive business oriented section in their VR program). MVR has not yet formed a plan, but it will likely be discussed at the September Regional Administrator meeting.</i></p>
<p><b><i>Encourage office involvement in business related groups.</i></b> Each office will be involved in at least one business related organization. An office could for example, identify a staff member who will serve as the "liaison" to local Chambers of Commerce in the major cities across our state or have a staff person involve themselves in their area JSEC (Job Service Employers Council). This type of involvement will provide an opportunity to give informational presentations on the MVR program. Regional administrators can document and share progress on this topic at regional administrators meetings.</p>	<p><i>7-2006 Offices are being encouraged to involve themselves in more business related organizations and activities.</i></p> <p><i>9-2006 Great Falls region is participating in local Chamber of Commerce meetings and social gatherings like "Chamber after Five". The Great Falls regional administrator is regularly attending JSEC meetings.</i></p> <p><i>Missoula regional administrator Janet Van Dyke continues to serve on the Missoula JSEC,, and employer-related information is shared with counselors at weekly staff meetings. VR is represented on three CMT groups (Missoula, Hamilton, Kalispell).</i></p> <p><i>The Butte region is involved in WIA activities, and counselors meet with JSEC members and local business leaders in their local CMTs either monthly or quarterly, depending on the CMT meeting schedule.</i></p>

### **Goal 3: Provide the best possible services to consumers**

**Work Group:** Beverly Berg, Bob Jahner, Brigitte Winfield, Mike Hermanson, Barbara Varnum, Scott Tanner

#### **Outcomes:**

1. Customers will be delighted with the services we provide.
2. Less complaints and less CAP; fewer repeat customers.
3. More jobs for consumers and more consumers in good jobs.
4. More taxpayers. People get better jobs and contribute more
5. More community involvement and better inter-agency collaboration.
6. Better services to hard-to-serve groups.
8. More resources for consumers.
9. More referrals and we serve more people
10. People who need us know we exist! We get positive word of mouth recommendations.
11. The capacity to serve students transitioning from school settings exists.
12. Increased credibility, leading to increased funding.
13. Gobs of people are ready, willing and enthusiastic about going to the Legislature on our behalf.
14. More cute stories about people we served coming back and telling us how important VR was in their success and how much VR impacted their lives.
15. Higher morale among staff.
16. The standards and indicators are met.
17. We are a model for other programs to emulate.
18. Stigma is reduced.

Activity	Our Progress
<b><i>Encourage Mental Health to partner with VR in starting employment programs with realistic coaching.</i></b>	<b>7-2006 A training session has been scheduled for September for VR and Mental Health to coordinate on business plans.</b> <i>9-2006 Thirty one people attended the training session, and 11 of those were MVR staff. Plans to partner continue. Addictive and Mental Disorders Division (AMDD) and MVR have scheduled a VR presentation (orientation) to AMDD and vice versa. A list serve is being proposed to encourage better participation. Great Falls MVR is working with the Center for Mental Health on implementation of their Crisis Peer Support project. They are also working on developing an improved information and referral system so that the agencies can effectively serve their mutual customers. This effort is the result of the Billings Mental Health conference this past September.</i>
<b><i>Address the needs of Blind and Low Vision Services consumers.</i></b> <ul style="list-style-type: none"><li>• Continue to recruit to fill vacant BLVS positions</li><li>• Develop a strategy for training assignments for rehabilitation teaching and orientation and mobility positions</li><li>• Conduct brainstorming/planning sessions to address the needed services through the Older Blind Program.</li></ul>	<i>7-2006 As of July 17, BLVS positions have all been filled. New staff include Diane Gray, Rehab Teacher trainee in Missoula; Bruce Breslauer, O&amp;M Specialist trainee in Great Falls; Frank Gruss, Rehab Teacher trainee in Butte; Jim Franklin, Rehab Counselor in Butte;</i>

	<p><i>Jeanne Stone, Program Assistant in Missoula.</i></p> <p><i>The first brainstorming session was held in March.</i></p>
<p><b><i>Work with existing technology services to develop better coordination of services.</i></b></p> <ul style="list-style-type: none"> <li>• Work with MonTech to make sure consumers receive the necessary technology.</li> <li>• Provide technology services through the new BLV adaptive equipment specialist.</li> </ul>	<p><i>7-2006 Kathy Laurin, MonTech Project Director, presented at the MVR All Staff Meeting in April 2006.</i></p> <p><i>Brigitte Winfield now sits on the MonTech Board.</i></p> <p><i>Chuck Granger, the BLVS adaptive equipment specialist, has been meeting with consumers, assessing their needs, setting up equipment, and providing training. He helped the Montana Association of the Blind set up computers for their summer orientation program, and he is helping get surplus computers to them to upgrade their training equipment. Chuck completed the first session on scripting for JAWS (screen reading software) and he will attend the advanced training in August.</i></p>
<p><b><i>Encourage VR central office management staff to attend as many VR council meetings as possible to transmit information and assist where requested by the council.</i></b></p>	<p><i>7-2006 VR Central office staff are encouraged to attend council meetings, and attendance has increased.</i></p>
<p><b><i>Use labor market information to place consumers in “quality” jobs</i></b></p> <ul style="list-style-type: none"> <li>• Ask local Job Service representatives to meet with MVR staff at each of the regional offices during 2006.</li> </ul>	<p><i>7-2006 Missoula Job Service disability coordinator presented to the Missoula VR staff.</i></p>
<p><b><i>Purchase and install video phones in three of the VR offices</i></b></p> <ul style="list-style-type: none"> <li>• John Sutherland and Bob Jahner will work with MTAP to get a video conferencing computer set up in four MVR offices to facility communication with consumers with deafness and their counselors.</li> <li>• Brigitte Winfield and Robert Jahner will propose a project to the Futures group on video conferencing to determine the availability and accessibility, and develop ideas of how video conferencing can be used to improve services through MVR.</li> </ul>	<p><i>7-2006 Video conferencing computers are set up in Great Falls and Billings, and the Kalispell office is working on getting theirs set up.</i></p> <p><i>The project has been proposed to new Futures members</i></p> <p><i>9-2006 The video conferencing project is moving along. Billings and Great Falls have set up their sites and have been able to communicate effectively. This technology is now being tested with customer communication.</i></p>
<p><b><i>Have a travel training sectional at All Staff so staff are familiar with public transportation options.</i></b></p>	<p><i>This was done at the All Staff meeting in April 2006</i></p>
<p><b><i>Have each BLVS office make a Low Vision Room for demonstrating equipment.</i></b></p>	<p><i>Each BLVS office has a Low Vision Room as of February 1, 2006.</i></p>

<p><b>Enhance transitions activities.</b></p> <ul style="list-style-type: none"> <li>• MVR (Brigitte Winfield) will co-author a letter with the Office of Public Instruction (OPI) to disseminate information about contacts for School Districts and MVR office.</li> <li>• MVR will maintain the list of contacts on its website and develop a system to keep the web updated.</li> <li>• MVR will complete the Memorandum of Understanding (MOU) with OPI to coordinate transition services for individuals leaving the school system and moving into adult service needs. This year, MVR will develop an interim agreement with Special Education in OPI.</li> <li>• MVR will support the National Governors' groups to better coordinate transition services and support getting an FTE in Montana for a state-wide transition coordinator</li> <li>• Several MVR counselors will attend the Transitions Conference in May 2006.</li> <li>• MVR will consider a booth at the Council of Exceptional Children is the spring of 2007.</li> <li>• During MYLF 2006, have one counselor from each region attend for one day, to answer questions and provide information on the VR program.</li> </ul>	<p><i>7-2006 The letter was completed, and MVR is deciding how to request updates for the upcoming school year.</i></p> <p><i>9-2006 Updated for the contacts have been requested, and the list will be updated once changes are identified.</i></p> <p><i>MVR representatives were involved with the National Governors Association grant and a proposal has been presented to the Governor's office for a full-time transition coordinator position</i></p> <p><i>12 MVR staff attended the Transition Conference in May.</i></p> <p><i>A representative from each region attended the MYLF training. This was a great success!</i></p> <p><i>Brigitte Winfield will attend the CEC conference April 4-6, 2007.</i></p> <p><i>9-2006 Missoula counselors continue to participate in tours and presentations at area high schools.</i></p>
<p>Provide quality service and counseling.</p> <p>Consider setting up a Computer Resource Center &amp; Library: Each office will work to establish an accessible computer resource center and library that is available for customer use. This area will have internet access so that occupational information and vocational resources can be found through The Montana Career Information System (MCIS), Occupational Information Network (ONET), The Job Accommodation Network (JAN), and the State Workforce System. These resources will allow customers to obtain information for vocational exploration and job search activities.</p>	<p><i>7-2006 Great Falls has set up a computer resource center and library which is used regularly by our customers. The computer which is available can access MCIS, ONET, JAN and the other resources available through the state workforce system.</i></p> <p><i>9-2006 The Butte region has consumer computer labs available in the Helena office and Butte office. The Warm Springs and Bozeman offices do not have the space to provide the service.</i></p>
<p>Continue treating all consumers with respect.</p> <p>Intake and Hospitality Environment: Each MVR office will look at their reception area with a "critical eye" and ask questions like the following: Will each customer who visits our office have a positive first impression? Is the waiting area comfortable and pleasant? Are there informational brochures available that describe programs and resources in the community? Would I be comfortable sending time in this space? Following a review of individual office environment, action steps will be initiated to improve areas identified. The Administrative Support Supervisor will be responsible for ensuring that this evaluation is completed and providing office staff with the results. Each office will work collaboratively to ensure that the agreed upon improvements are completed.</p>	<p><i>7-2006 Great Falls did complete a review of their intake and hospitality environment. Changes were made in a variety of areas including seating, magazines, a beverage table, availability of agency and resource literature, and general décor.</i></p> <p><i>9-2006 All Butte offices provide a hospitable environment; however, space is very limited in the Bozeman and Warm Springs offices.</i></p>
<p><b>Continue seeking public and consumer input.</b></p> <ul style="list-style-type: none"> <li>• Continue to hold the annual Public Hearing: Barbara Varnum will schedule the hearings, send out announcements to the Friends of Rehab and MVR staff, and reserve the MetNet system. This will occur on an annual basis (usually early spring). Upon</li> </ul>	<p><i>7-2006 The public hearing was held on March 3, 2006. The summary of the meeting was sent out to "Friends of Rehab" on May 3, 2006.</i></p>

<p>completion of the Public Hearing, Barbara will send out a summary of the meeting to all those who attended, and to the Friends of Rehab.</p> <ul style="list-style-type: none"> <li>• <b><i>Continue to hold annual regional focus forums: The Regional Administrators will be responsible for scheduling, notifying, and facilitating the focus forums on an annual basis. The Regional Administrators will send a summary of the focus forums to Central Office.</i></b></li> <li>• Continue to send out the consumer satisfaction surveys on all closed “26” &amp; “28” cases. Kim Harvey, Central Office Administrative Support, will continue to send out the consumer satisfaction surveys on a monthly basis.</li> </ul>	<p><i>Great Falls Regional Focus Forum will be held September 6, 2006. The topic will be “What does finding a good job mean to a person receiving Social Security benefits?”</i></p> <p><i>9-2006 The BLVS Focus Forum was held in March and focused on needs of older individuals with blindness.</i></p> <p><i>We are now sending out the consumer satisfaction survey two times a month.</i></p>
<p><b><i>Share independent living needs with the SILC.</i></b></p> <p>Request the opportunity to present the needs of the VR consumers in at least one State Independent Living Council Meeting per year by a staff member of MVR. The individual representing MVR would be a regional manager or an administrator.</p>	<p><i>7-2006 Joe Murphy, Butte Regional Administrator, presented at the SILC meeting in May 2006.</i></p>

**Goal 4: Provide and develop more opportunities for transportation for people with disabilities; assist with and coordinate other efforts.**

**Work Group:** Mike Hermanson, Carol Lambert, Matt Bugni

**Outcomes:**

1. People can get where they want when they want.
2. More people can work.
3. Community involvement.
4. More voters get to the polls. More people are in the work force.
5. Better economic development in Montana.
6. Better access to medical treatment and care, all services, and education.
7. Higher quality of life.
8. Less stress on family members.
9. True independence.
10. ADA compliance

Activity	Our Progress
<p><b><i>Develop ideas for new transportation funding.</i></b>            Develop a guide for Rehabilitation staff, VR Council, and SILC on 5310 funds, 5311 funds, TransAid funds, and New Freedom Funds to assist them in understanding funding available and encourage them to participate in their local Transportation Advisory Committees. - Will need to wait until after Department of Transportation releases guidelines on New Freedom Funds and guidelines for new planning documents, probably by Dec. 1, 2006. Mike Hermanson would be responsible for this summary.</p>	
<p><b><i>Work on state initiatives for transportation.</i></b> Legislation could be developed to require that persons with disabilities be required to be on Transportation Advisory Committees. Carol Lambert and Mike Hermanson could work on this with Marlene Disburg and the SILC. A draft would be available for the SILC Symposium to consider in August.</p>	<p><i>9-2006 Marlene Disburg presented at the symposium, but the specific legislation was not drafted. A committee was set up at the symposium to work on legislative issues, and the possibility of legislation will be passed on to them. Significant emphasis was made at the Symposium for consumers to become active in their TACs.</i></p>
<p><b><i>Participate in the development of the overall state plan for transportation.</i></b> Work with the transportation coordinator and other agencies.</p>	
<p><b><i>Coordinate transportation resources.</i></b>            Invite Marlene Disburg, the state transportation coordinator, to present at a VR central office staff meeting on coordination efforts at least once a year. Ask her to bring ideas on how VR could assist with coordination.</p>	<p><i>Marlene Disburg attended the September 26 Central Office staff meeting. She updated staff on transportation activities. Montana Department of Transportation received a large increase in funding, and it does require a state/local match. There was an attempt to coordinate public transportation providers and DD services in one community, but not all the bugs have been worked out.</i></p>
<p><b><i>Seek new resources for transportation.</i></b>            Ask Marlene Disburg, the state transportation coordinator, to present on how to be an advocate on a Transportation Advisory Council (TAC) at a Regional Administrators meeting. This will encourage people with</p>	

disabilities to be on their local TACs.	
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**Goal 5: Ensure the high quality administration and functioning of the VR program and ensure good accountability**

**Work Group:** Peggy Williams, Joe Mathews, Bob Jahner, Ruth Straley, Dick Trerise

**Outcomes:**

1. Credibility with Legislature, the umbrella agency, consumers, federal government, the VR Council, disability organizations, and taxpayers.
2. Maximize resources.
3. The federal standards are met.
4. Funding is assured.
5. Consumers are happy.
6. Resources are utilized optimally.
7. Work force needs are met.
8. We are a valuable contributor to economic development in the state.

Activity	Our Progress
<p><b><i>Utilize interagency linkages and collaborations to best serve our consumers.</i></b></p> <ul style="list-style-type: none"><li>• Make contact and explore linkages with Adult Basic Education.</li><li>• Update all cooperative agreements including Workforce, Higher Education, and Native American VR Projects.</li><li>• Educate the Citizens Advocate on the VR program so that he can make proper referrals to VR.</li><li>• Develop a “Who are you going to call” sheet for Central Office (with people’s names) so that people with disabilities who call but are not eligible for the VR program can be referred to other programs (for example, someone who is having back surgery and will be incapacitated for a few months, and has no source of income or insurance).</li></ul>	<p><i>7-2006 We are waiting to hear back from Higher Education on the cooperative agreement—they are reviewing our proposal. We also are actively trying to get cooperative agreements signed with the Section 121 Native American VR projects.</i></p> <p><i>9-2006 All the Tribal 121 Projects attended the July 2006 MVR Council meeting at Fort Belknap. We reviewed the cooperative agreements at this meeting, and individual projects will be sending Barbara Varnum proposed changes to their cooperative agreements.</i></p> <p><i>The cooperative agreement with Higher Education was signed in July.</i></p> <p><i>The VR state plan for fiscal year 2007 has been approved by the feds.</i></p> <p><i>Missoula VR staff met with UM College of Technology, MonTech, and adult education to discuss new programs and how we work together.</i></p>
<p><b><i>Improve the response rate to our consumer satisfaction survey.</i></b></p> <ul style="list-style-type: none"><li>• As a best practice, have counselors inform consumers of the survey’s importance and value during the exit interview. Also, enclose a stuffer announcing the survey in the closure letter to the consumer.</li><li>• Send out the survey twice a month instead of monthly starting in May.</li><li>• Interview other agencies in the department that conduct surveys to see if there are any other techniques we can use.</li><li>• Present an award at All Staff to the region with the highest response rate on the survey.</li><li>• Develop and commit to a survey format and survey solicitation improvement model and implement. Finalize the methodology.</li></ul>	<p><i>7-2006 In May we started sending out the surveys twice a month. We will discuss the other ideas at the Regional Administrator meeting in September.</i></p> <p><i>Barb is working on a spreadsheet to compare the results of the survey over the past 3-5 years. This comparison will be done by the October VR Council meeting.</i></p>



<p>Tie up the whole survey issue and put it to bed!</p> <ul style="list-style-type: none"> <li>Commit to do something with the results. Decide what changes should be made to the VR program—maybe develop regional responses. Look for trends based on the last 3 years of surveys.</li> </ul>	
<p><b><i>Expand accountability of our data and contingency plan.</i></b></p> <ul style="list-style-type: none"> <li>Develop a plan for data expansion and associated resource requirements (organizational structure of the office, FTE, budget, etc). Anticipate changes as a result of reauthorization, be proactive and if necessary, put in a request for additional FTE in our EPP budget request.</li> <li>Keep the Council informed on the status of the reauthorization and the new activities it will entail.</li> </ul>	<p><i>7-2006 At the spring 2006 CSAVR meeting, Peggy met with federal representatives who have not decided what data requirements will be in the future.</i></p> <p><i>Reauthorization took an unexpected twist when the Senate passed their version of the bill. Most people expected that it would not get through the Senate this year. The House and Senate versions have many areas of discrepancy.</i></p>
<p><b><i>Produce outcomes that continue to meet the federal standards and indicators.</i></b></p> <ul style="list-style-type: none"> <li>Monitor VR's progress to the current year standards and indicators quarterly and make policy/procedure corrections if needed.</li> <li>Develop a tentative plan to address anticipated new indicators.</li> <li>Commit to sending a VR Council member to national meetings regarding the future of Vocational Rehabilitation. We will need someone to build expertise in this area. Provide direction and guidance to the Council to establish the role, function, and positions to be represented by the Council representative.</li> </ul>	<p><i>7-2006 MVR is monitoring the standards and indicators. In 2005, MVR met all the indicators. At this point, the federal government has not introduced new indicators.</i></p>

**Goal 6: Ensure adequate funding.**

**Work Group:** Matt Bugni, Deann Willcut, Peggy Williams

**Outcomes:**

1. Shorter waiting list, with no Order of Selection.
2. The needs of our customers are met.
3. Optimal and efficient resources exist.
4. Lack of insurance is no longer a barrier to work. No dis-incentives to work exist.
5. Additional staff to reflect population growth exists.
6. There is a regional office in Broadus.
7. Competitive salaries, higher retention, and less turnover all are in place in the Program.

Activity	Our Progress
<b><i>Match as many state dollars as possible with federal funds.</i></b> The VR program is currently using state funds to match all federal revenue available. The financial bureau will request decision packages in the budgeting process for the 2009 biennium to match all of the federal funds that are projected to be available, and will not advocate against having more state funds appropriated to VR than can be matched with federal funds. This would allow VR to draw all federal revenue possible in future years (as the federal grant amounts change) and aid VR in avoiding order of selection.	<i>7-2006 In SFY 2006, all available federal VR funds were matched. Through the EPP process, VR has requested slightly more state funds than would be required to match projected available federal funds.</i>
<b><i>Coordinate with the DPHHS Director's Office to advocate for Medicaid Buy-in.</i></b> Given direction from the Executive, DSD will support legislation for Medicaid Buy-in.	
<b><i>Support ongoing funding for the Montana Youth Leadership Forum (MYLF).</i></b> DSD currently has an EPP item for the 2009 biennium to continue the \$50,000 per year funding from HB 550 of the 2005 Legislature for MYLF.	<i>7-2006 This EPP item did not make the cut for the department's EPP items. VR will not advocate against this funding if it is proposed in a separate bill in Session.</i>
<b><i>Continue program support.</i></b> DSD is currently in the process of transitioning to Pay Plan 20, with a goal of utilizing this competency-based pay model to facilitate the division in offering more competitive salaries in the hopes of higher staff-retention. The goal for the division is to transition to PP 20 before the end of fiscal year 2006. Utilization of the pay plan will be a work in progress over the next few biennia.	<i>7-2006 Almost all VR position descriptions are in job profile format and are with the Personnel Bureau for Pay Plan 20 classification. When classification is complete, union negotiations need to take place. Complete transition is expected this fall.</i>

**Goal 7: Implement, improve, and streamline the case management system.**

**Work Group:** Bob Jahner, Marvalee Christofferson, Barbara Varnum

**Outcomes:**

1. Less paperwork.
2. More time face-to-face with consumers.
3. Easier case reviews.
4. Better, more consistent data.
5. Improve accountability.
6. Model for the country.
7. Lap top on every desk.
8. Better informed consumer choice.
9. CRP report card provides high quality unbiased information.
10. High morale, with a fair caseload.
11. Faster appropriate services to consumers.

Activity	Our Progress
<p><b><i>Use "Case-E" to reduce paper work and increase face-to-face time with consumers.</i></b></p> <p>We have the development of this system in place and the timelines regarding its completion are largely in the hands of the department programmers. We anticipate having test modules out in the field this summer.</p>	<p><i>7-2006 Bob Jahner has been intensely focused on working with the programmer. The case management system is approximately 80% constructed. We are looking for testing and initial rollout in the late fall.</i></p> <p><i>9-2006 Bob Jahner demonstrated the Case-E process to administrative support and the management team. We have also put together the first formal training formats that will be rolled out later fall/early winter.</i></p>
<p><b><i>Finish the Community Rehabilitation Program (CRP) report card.</i></b></p> <p>This is also near completion. We have completed the programming allowing counselors to assign credit to CRP's for successful competitive employment outcomes. With this data element we will be able to generate a great deal of information about production and the standards of that production. Our goal is to run our first baseline standards and indicators for CRP's this October for the federal program year 2006.</p>	<p><i>7-2006 Barb Varnum has met with the CRPs in the Missoula and Kalispell areas to gather input regarding the report card. CRPs will be reporting their standards and indicators to MVR so that we can compare their data with MVR's data. Reporting will start October 1, 2006, and the first year will be a pilot year.</i></p> <p><i>9-2006 We are calling this a data report rather than a report card. A letter was sent to all CRPs regarding the data report in September.</i></p>

### **Implement case management system.**

a. We recognize that case management is a broad term that covers a multitude of activities. We concentrated our discussion on exploring and accurately profiling the existing caseloads in the regions. Our recommendations are:

- i. Consult with the management team in the March RA meeting.
- ii. Audit a sample of status 10 cases [these are cases that have been determined eligible for VR services, but do not yet have a signed plan---IPE] in the region and assign those cases to one of the following categories:
  1. IPE development in active status;
  2. IPE development inactive at consumer's request;
  3. IPE development inactive for reasons other than documented consumer basis; or
  4. Qualified Goal Assessment Plan in place.
- iii. Conduct an analysis of the audit and other AWACS based data that might give us an idea how to better evaluate both the work distribution and caseload distribution in Montana.
  - depending on the analysis of the Status 10 audit, determine if we need to look at other statuses such as status 18 (services being provided under an IPE).
- iv. Upon completion of the caseload profiles, make recommendations to the Council regarding how we could improve the caseload distribution.

*7-2006 We are 75 % complete on the auditing of all status 10 cases. We will complete the percentage profile after the Billings review in August. The state is also in the process of a thorough review of cases that are inactive and deciding if that inactivity merits closure or some other action.*

*Once having completed the above activities we will be in a clearer position to present a set of questions and considerations to the Council for their response.*

*9/2006 Bob has requested a formal rule change to 120 days as a definition of timeliness. We are also conducting implementation training for 120 days in our October bi-district training. The 120 days refers to how long it can take from the time a person is determined eligible for VR services until he has a signed plan. Currently, MVR allows 6 months, and, at RSA's direction, we are changing the policy to 120 days.*

**Goal 8: Encourage, develop, and promote the staff's professional development.**

**Work Group:** Brigitte Winfield, Chuck Leggate, Joe Murphy

**Outcomes:**

1. Better counselors.
2. Better outcomes for consumers.
3. More satisfied consumers.
4. More outcomes, more employment for consumers.
5. A high retention rate of staff, with less turnover.
6. Less complaints and administrative reviews.
7. Efficiencies, work more quickly, and more effectively.
8. Better staff morale.
9. A proud work climate.
10. Counselors would have more confidence in their abilities.
11. A better team that works together well.
12. Respect within the professional community

Activity	Our Progress
<i>Develop a core-training package for staff.</i> <ul style="list-style-type: none"><li>• <b>Ask Futures to review Chuck's work in this area and to develop a training curriculum for new counselors.</b></li><li>• <b>Implement statewide</b></li></ul>	<i>7-2006 This is currently being worked on. Mark Mahnke, Pete Sesselman, and Brigitte Winfield have taken this on as an MVR Futures project.</i> <i>9-2006 A counselor survey has been developed, and it will be completed at Bi-District training in October. The survey asks counselors to reflect on their training experience and identify preferred methods—what worked and what didn't work.</i>
<i>Provide professional development for staff.</i> <ul style="list-style-type: none"><li>• <b>Continue to conduct an annual Training Needs Assessment, in which all staff participate. This information, along with other sources of critical feedback, helps to determine necessary training topics.</b></li><li>• <b>Continue to give staff have the opportunity to attend three major training sessions per year: the Montana Association for Rehabilitation Conference, the MVR All Staff Meeting, and the MVR Bi-District Meeting.</b></li><li>• <b>Continue to provide individualized, specialized training to staff throughout the state. Continue to have a Comprehensive System of Personnel Development Plan for every rehabilitation counselor, in which we identify the steps the counselor is taking to meet the agency standard of a 'qualified rehabilitation counselor'.</b></li></ul>	<i>7-2006 We are continuing to do each of these three action steps.</i> <i>9-2006 More staff are participating in MAR than ever before.</i>
<i>Train staff on benefits planning.</i> <p><b>Within Central Office we have one staff person who is considered the agency "expert" on Social Security and who has received national certification.</b></p> <ul style="list-style-type: none"><li>• <b>Determine what benefits training is needed in each region. This can be a combination of presentations</b></li></ul>	<i>7-2006 Barb Varnum attended a very comprehensive training on benefits planning, and she is certified.</i>

<p>from the Central office benefits planner, individual assistance from the benefits planner, and local workshops.</p> <ul style="list-style-type: none"> <li>• Participate in the needed training.</li> </ul>	
<p><i>Recruit and retain qualified staff.</i></p> <ul style="list-style-type: none"> <li>• When we are unable to hire counselors at the Master's Degree level, we hire them on the condition that they will obtain their Master's Degree in Rehabilitation Counseling.</li> <li>• MVR is also actively involved in succession planning as we move into a time of greater than usual retirements. We will remain committed to the leadership council known as the MVR Futures Group, made up of staff at all levels within the agency who are interested in honing their leadership skills and providing service to the agency above and beyond what would be normal within their current positions. Leadership training is a prerequisite for participation in this group.</li> </ul>	<p>7-2006 <i>We continue to do this when necessary.</i></p> <p><i>Three individuals are currently participating in the Emerging Leaders Series through Western Washington University.</i></p> <p>9-2006 <i>Two new counselors were hired in the Missoula region. One existing counselor has completed the masters degree and will sit for the CRC in October.</i></p>
<p><i>Incorporate feedback from the VR Council and from consumers into the in-service training plan.</i></p> <ul style="list-style-type: none"> <li>• When the VR Council brings training issues to the agency, MVR will try to incorporate those training topics in a training session—an example of this is training on diversity.</li> <li>• Continue to seek feedback from consumers through a number of means. We will continue to run a client satisfaction survey and hold annual public hearings. This information will be synthesized and shared with the training coordinator who will continue to incorporate identified issues (that appear to demonstrate training needs) into the training agendas.</li> </ul>	<p>7-2006 <i>We continue to do both of these action steps.</i></p>
<p><i>Maintain positive morale and work culture.</i></p> <ul style="list-style-type: none"> <li>• Continue to monitor morale quarterly through discussions at Regional Administrator meetings.</li> <li>• Decide whether to conduct an anonymous staff survey related to morale and work culture (discuss at May RA meeting).</li> </ul>	<p>7-2006 <i>We continue to do this.</i></p> <p><i>Discussion related to a morale survey is ongoing among the management staff. A mini-survey was completed before the All Staff meeting.</i></p> <p>9-2006 <i>We discussed the idea of a staff survey, and there were mixed views.</i></p>
<p><i>Advance counselor skills regarding placement, customer service, etc.</i></p> <ul style="list-style-type: none"> <li>• Continue to keep this as a high priority topic for training.</li> <li>• Continue to make every effort to bring all counseling staff to the level of being master's degreed.</li> </ul>	<p>7-2006 <i>The 2006 Montana Association of Rehabilitation conference will place a heavy emphasis on quality placements for persons with disabilities.</i></p> <p><i>We continue to develop CSPD plans with every counseling staff person.</i></p>